

# Retention and Classification Report

**Agency:** Navigator Pointe Academy (Utah) (3446)

6844 South Navigator Road  
West Jordan, UT 84088-4405  
801-840-1210

**Records Officer** Shawna Pierce

28134	Accounts payable, vendors and procurement files
28204	Bank, Facility and Risk Management
28096	Board Governance Financial Records
28205	Board Minutes and Policies
28142	Human resource and payroll related records
28143	Student records

**AGENCY:** Navigator Pointe Academy (Utah)

**SERIES:** 28134

3

**TITLE:** Accounts payable, vendors and procurement files

**DATES:** 2004-

**ARRANGEMENT:** Alphabetical by name

**DESCRIPTION:**

These records are used to pay school district bills. They include copies of checks, invoices, purchase orders, and receiving reports. May also include correspondence with vendors and computer printouts.

**RETENTION:**

Retain 7 years

**DISPOSITION:**

Destroy.

**RETENTION AND DISPOSITION AUTHORIZATION:**

Retention and disposition for this series is authorized by Archives general schedule SD 5, Item 1.

**AUTHORIZED:** 11/02/2012

**FORMAT MANAGEMENT:**

The retention and disposition information on this schedule applies to the record copy which can be in any format. The record copy can include different formats. Format management information provided here is for the purpose of managing records that are being either stored by or transferred to Utah State Archives.

Paper: Retain in Office for 1 year and then transfer to State Records Center. Retain in State Records Center for 6 years and then destroy.

**APPRAISAL:**

Administrative Fiscal

**AGENCY:** Navigator Pointe Academy (Utah)

**SERIES:** 28134

**TITLE:** Accounts payable, vendors and procurement files

(continued)

**PRIMARY CLASSIFICATION:**

Public

**AGENCY:** Navigator Pointe Academy (Utah)

**SERIES:** 28204

3

**TITLE:** Bank, Facility and Risk Management

**DATES:** 2005-

**ARRANGEMENT:** chronological, then alphabetical

**DESCRIPTION:**

These are administrative financial records. Records may include bank records, bond records, risk management and any expenses related to maintenance and improvement. They document administrative procedure and activities.

**RETENTION:**

Retain 7 years.

**DISPOSITION:**

Destroy.

**RETENTION AND DISPOSITION AUTHORIZATION:**

Retention and disposition for this series is authorized by Archives general schedule SG 7, Item 55.

**AUTHORIZED:** 02/15/2013

**FORMAT MANAGEMENT:**

The retention and disposition information on this schedule applies to the record copy which can be in any format. The record copy can include different formats. Format management information provided here is for the purpose of managing records that are being either stored by or transferred to Utah State Archives.

Paper: Retain in Office for 1 year and then transfer to State Records Center. Retain in State Records Center for 6 years and then destroy.

**APPRAISAL:**

Administrative Fiscal

These records are not permanent financial records. They document school facility, budget and expenditures.

**AGENCY:** Navigator Pointe Academy (Utah)

**SERIES:** 28204

**TITLE:** Bank, Facility and Risk Management

(continued)

**PRIMARY CLASSIFICATION:**

Public

**AGENCY:** Navigator Pointe Academy (Utah)

**SERIES:** 28096

3

**TITLE:** Board Governance Financial Records

**DATES:** 2005-

**ARRANGEMENT:** Chronological then alphabetical

**DESCRIPTION:**

These are financial use by the school board in governing the financial affairs of the school. These records are used to monitor the financial compliance of the school in relation to board policies, state and federal laws, and the school's charter. The records include audited financial statements, tax returns, state and federal program reports, Annual Financial Reports, and Annual Program Reports.

**RETENTION:**

Retain Permanent

**DISPOSITION:**

Destroy.

**RETENTION AND DISPOSITION AUTHORIZATION:**

Retention and disposition for this series is authorized by Archives general schedule SD 5, Item 4.

**AUTHORIZED:** 02/19/2013

**FORMAT MANAGEMENT:**

The retention and disposition information on this schedule applies to the record copy which can be in any format. The record copy can include different formats. Format management information provided here is for the purpose of managing records that are being either stored by or transferred to Utah State Archives.

Paper: Retain in Office for 3 years and then transfer to State Records Center. Retain in State Records Center permanently.

**APPRAISAL:**

Administrative Fiscal Historical

These are financial use by the school board in governing the financial affairs of the school. They document the history of the school's activities and finances. UCA 51-2-3(3) (2008)

**AGENCY:** Navigator Pointe Academy (Utah)

**SERIES:** 28096

**TITLE:** Board Goveranance Financial Records

(continued)

**PRIMARY CLASSIFICATION:**

Public

**AGENCY:** Navigator Pointe Academy (Utah)

**SERIES:** 28205

3

**TITLE:** Board Minutes and Policies

**DATES:** 2005-

**ARRANGEMENT:** Chronological, then alphabetical

**DESCRIPTION:**

These are board meeting minutes. They may include organizational files and policies.

**RETENTION:**

Retain Permanent

**DISPOSITION:**

Retain in agency custody.

**RETENTION AND DISPOSITION AUTHORIZATION:**

Retention and disposition for this series is authorized by Archives general schedule SD 1, Item 15.

**AUTHORIZED:** 02/15/2013

**FORMAT MANAGEMENT:**

The retention and disposition information on this schedule applies to the record copy which can be in any format. The record copy can include different formats. Format management information provided here is for the purpose of managing records that are being either stored by or transferred to Utah State Archives.

Paper: Retain in Office for 5 years and then transfer to State Records Center. Retain in State Records Center permanently.

**APPRAISAL:**

Administrative Historical Legal  
Minutes, organizational files and the policies document the history of the school



**AGENCY:** Navigator Pointe Academy (Utah)

**SERIES:** 28142

3

**TITLE:** Human resource and payroll related records

**DATES:** 2004-

**ARRANGEMENT:** Alphabetical by name thereunder chronological for payroll

**ANNUAL ACCUMULATION:** 1.00 cubic foot.

**DESCRIPTION:**

These are the personnel files for all school employees, along with all other records related to the human resource and payroll functions. They are used to document employment, wages, benefits, and other human resource and payroll related information. The files include the employment applications, employee history, pay and leave history, work performance, evaluation records, teaching certificates, and related correspondence. Records may also include fingerprints and verification of the criminal background check. These files also include history of benefits offered and taken, contracts with brokers and providers, and payroll reports including time cards.

**RETENTION:**

Retain 65 years

**DISPOSITION:**

Destroy.

**RETENTION AND DISPOSITION AUTHORIZATION:**

Retention and disposition for this series is authorized by Archives general schedule 94, Item 1.

**AUTHORIZED:** 11/08/2012

**FORMAT MANAGEMENT:**

The retention and disposition information on this schedule applies to the record copy which can be in any format. The record copy can include different formats. Format management information provided here is for the purpose of managing records that are being either stored by or transferred to Utah State Archives.

Paper: Retain in Office for 2 years and then transfer to State Records Center. Retain in State Records Center for 63 years and then destroy.

**AGENCY:** Navigator Pointe Academy (Utah)

**SERIES:** 28142

**TITLE:** Human resource and payroll related records

(continued)

**APPRAISAL:**

Administrative Fiscal Legal

**AGENCY:** Navigator Pointe Academy (Utah)

**SERIES:** 28143

3

**TITLE:** Student records

**DATES:** 2004-

**ARRANGEMENT:** alphabetical

**ANNUAL ACCUMULATION:** 1.00 cubic foot.

**DESCRIPTION:**

These are student cumulative files for students whose records were not transferred but no longer attend this school. They were used to document the student's attendance. They include test scores, immunization record, eye testing, and all pertinent information on the student. These student files are commonly known as "dead files."

**RETENTION:**

Retain 3 years

**DISPOSITION:**

Destroy.

**RETENTION AND DISPOSITION AUTHORIZATION:**

Retention and disposition for this series is authorized by Archives general schedule SD 17, Item 23.

**AUTHORIZED:** 02/01/2013

**FORMAT MANAGEMENT:**

The retention and disposition information on this schedule applies to the record copy which can be in any format. The record copy can include different formats. Format management information provided here is for the purpose of managing records that are being either stored by or transferred to Utah State Archives.

Paper: Retain in Office for 3 years after student graduated and then destroy.

**APPRAISAL:**

Administrative Legal

**AGENCY:** Navigator Pointe Academy (Utah)

**SERIES:** 28143

**TITLE:** Student records

(continued)

**PRIMARY CLASSIFICATION:**  
Exempt FERPA